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Turkey Industry in Mexico

The domestic turkey industry in Mexico is small. Turkey production in 2004 was only 13,000 metric tons, compared to 2,389,000 metric tons of broilers. Two companies account for almost 90% of turkey production in Mexico and most turkey production is in Chihuahua (40%) and Sonora (50%). About 75% of domestic production is sold as raw whole turkeys for the Christmas season. The balance is sold as domestic turkey parts and further-processed products. Production is expected to remain flat, at 13,000 MT for 2005 and 2006.

Turkey Production, Imports and Per Capita Consumption

	2004	2005e	2006f
Production (MT)	13,000	13,000	13,000
Imports (MT)	144,000	170,000	179,000
Per Capita consumption (kg)	3.17	3.21	3.24
e-estimate			
f-forecast			

Per capita consumption is increasing due to a growing demand for processed turkey products, such as turkey patties, nuggets, cold cuts, oven-cooked turkey legs and the use of turkey in blended pork and turkey hams. Flat production and rising per capita consumption will result in an increased demand for imports.

Mexican Turkey Imports Jan-Dec 2004 in mt

	Whole Frozen	MST Frozen	MST Fresh	Parts Fresh/Chilled	Parts Frozen
US	2,050	8,624	3,442	73,775	39,422
Chile	1,120	4,461			
Other	0				168
Subtotal	13,170	13,085	3,442	73,775	39,590

* mechanically separated turkey

Source: USDA/FAS

U.S. Exports to Japan, egg products in metric tons, shell eggs in thousand dozens, values in thousand dollars

	January-December		January-June			
	2004		2004		2005	
	MT	Value	MT	Value	MT	Value
*Egg yolks	6,665	13,440	1,839	3,790	4,746	9,544
Dried whole	570	2,341	80	405	2,110	7,222
Dried yolks	453	1,639	247	1,015	423	1,204
Dried albumin	51	288	0	0	186	1,095
*Whole eggs	59	118	34	65	197	350
Shell Eggs	0	0	0	0	3,136	2,149
*Albumin	0	0	0	0	0	0
*frozen, liquid						

Source: Department of Commerce, U.S. Census Bureau, Foreign Trade Statistics

Update on Avian Influenza

Russia lifted the quarantine from twelve settlements in Siberia as the spread of high path avian influenza slowed. Since it was first detected in July, about 11,000 birds have died of disease and an additional 127,000 birds have been slaughtered.

After one village in Kazakhstan confirmed an outbreak of avian influenza, the virus spread to seven northern Kazakh villages. At least 9,000 birds have died or been destroyed since the first case was reported in July. No new cases have been reported since August 15, but quarantines will be kept in place until October.

Tests on dead wild birds in Mongolia identified H5N1 in one dead whooper swan out of 100 birds tested. Samples from 140 live birds from the same site tested negative.

In Europe, the Dutch agriculture ministry ordered all commercial poultry farmers with free-range birds to bring their flocks indoors effective August 22, 2005 to avoid exposure to avian influenza through wild birds. About 5.5 million birds out of a national flock of 105 million, or 5 percent, are effected.

Germany would require farmers to bring their free-range birds indoors in mid-September if the disease spreads into Europe.

The United Kingdom had no plans to ban keeping fowl outdoors. In the UK's laying flock of 30 million, about 33 percent are free-range. About 2 to 3 percent of the 150 million broiler chickens are raised outdoors.

Representatives of EU member countries' veterinary services will meet in Brussels on August 25 to discuss the situation.

Source: news wires

Japan: Frozen Egg Imports (in metric tons)

	Frozen Whole Eggs	Frozen Yolks	Frozen Albumen	Total
2004				
March	211.3	524.2	2.0	737.5
April	202.6	233.2	0.0	435.8
May	196.1	225.5	0.0	421.6
YTD	858.6	2,516.6	2.0	3,377.2
2005				
March	758.0	1,608.7	127.2	2,493.9
April	520.0	1,722.4	217.7	2,460.1
May	465.5	1,660.7	421.2	2,547.4
YTD	1,920.8	7,175.7	334.9	9,431.4

Source: Ministry of Finance "Japan Exports and Imports" ALIC

Inspected Egg Products-U.S. & Canada Export/Import Trade**U.S./Canadian Live Poultry Slaughtered Under Inspection**

W/E 13-Aug-05 (PRELIMINARY)

U.S. Exports to Canada, in Pounds (000) (Preliminary)

Week Ending August 13, 2005		Year-To-Date		
TYPE	2005	2004 1/	2005 2/	2004
Liquid	411	607	11,037	9,281
Frozen	0	0	113	11
Dried	0	1	449	428
Total	411	608	11,599	9,720

U.S. Imports From Canada, in Pounds (000) (Preliminary)

Week Ending August 13, 2005		Year-To-Date		
TYPE	2005	2004 1/	2005 2/	2004
Liquid	161	402	4,587	5,524
Frozen	0	0	654	1,132
Dried	25	48	371	1,813
Total	186	450	5,612	8,469

Inspected Shell Eggs**U.S Exports To Canada, In 30-Dozen Cases (Preliminary)**

Week Ending August 13, 2005		Year-To-Date		
TYPE	2005	2004 1/	2005 2/	2004
Jumbo	0	0	130	288
Extra Large	4,222	4,050	139,925	108,006
Large	3,345	7,452	226,772	229,371
Medium	3,227	3,066	68,059	78,155
Ungraded	0	4,092	61,948	182,094
Misc	0	780	7,753	16,790
Total	10,794	19,440	504,587	614,704

1/ Comparable Week, to-date figures may not total due to rounding.

2/ Includes revisions to previous week(s).

Data Source: Agriculture and Agri-Food Canada, AISD, AID, Poultry Section

Source: USDA/AMS Poultry Programs, Market News Branch.

U.S. Fowl Slaughtered Domestically

	Light Hens	Heavy Hens	Total Hens
-----Thousands-----			
Head	1,187	1,720	2,907
Last Week	1,274	1,703	2,977
Same week yr ago	1,445	1,498	2,943
To-date/2005	48,298	45,364	93,662
To-date/2004	43,274	42,254	85,528

U.S. Fowl Slaughtered in Canada

	Light Hens	Heavy Hens	Total Hens
-----Thousands-----			
Head	240	0	240
Last Week	51	4	55
Same week yr ago	221	0	221
To-date/2005	8,275	37	8,312
To-date/2004	7,833	90	7,923

Data Source: Agriculture and Agri-Food Canada, AISD, AID, Poultry Section

Total U.S. Fowl slaughtered in the U.S. and Canada

	Light Hens	Heavy Hens	Total Hens
-----Thousands-----			
Head	1,427	1,720	3,147
Last Week	1,325	1,707	3,032
Same week yr ago	1,666	1,498	3,164
To-date/2005	56,573	45,401	101,974
To-date/2004	51,107	42,344	93,451

Source: USDA/AMS Poultry Programs, Market News Branch

CENTRAL REGION MECHANICALLY SEPARATED CHICKEN

F.O.B. SHIPPER DOCK OR EQUIVALENT, PRICES NEGOTIATED FOR MECHANICALLY SEPARATED CHICKEN IN THE CENTRAL REGION IN TRUCKLOT AND LESS THAN TRUCKLOT VOLUMES, CENTS PER POUND, DELIVERY WITHIN TWO WEEKS.

Aug 19, 2005

CHICKEN WITH SKIN ADDED

FAT CONTENT	--- PRICES ---		---- VOLUME ----	
	FROZEN	FRESH	TOTAL	EXPORT
15% OR LESS				
RANGE	-	18.00-24.00	163,200	-
WTD AVERAGE		22.50		
15-20%				
RANGE	17.75-24.00	16.00-22.00	1,249,600	434,400
WTD AVERAGE	19.86	18.03		
20% OR MORE				
RANGE	-	-	-	-
WTD AVERAGE				

* INCLUDES THE STATES of AL, AR, IA, IL, IN, KS, KY, LA, MI, MN, MO, MS, ND, NE, OK, OH, SD, TN, TX, WI

EASTERN REGION MECHANICALLY SEPARATED CHICKEN

F.O.B. SHIPPER DOCK OR EQUIVALENT, PRICES NEGOTIATED FOR MECHANICALLY SEPARATED CHICKEN IN THE EASTERN REGION IN TRUCKLOT AND LESS THAN TRUCKLOT VOLUMES, CENTS PER POUND, DELIVERY WITHIN TWO WEEKS.

Aug 19, 2005

CHICKEN WITH SKIN ADDED

FAT CONTENT	--- PRICES ---		---- VOLUME ----	
	FROZEN	FRESH	TOTAL	EXPORT
15% OR LESS				
RANGE	20.50-22.75	21.00-22.00	552,000	312,000
WTD AVERAGE	21.25	21.67		
15-20%				
RANGE	19.00-27.50	16.00-23.00	1,408,000	728,000
WTD AVERAGE	22.14	19.12		
20% OR MORE				
RANGE	-	14.00	80,000	-
WTD AVERAGE		14.00		

* INCLUDES THE STATES of CT, DE, FL, GA, MA, MD, ME, NC, NH, NJ, NY, PA, RI, SC, VA, VT, WV

NATIONAL YOUNG TURKEY PARTS AND BULK MEAT, FROZEN (UNLESS SPECIFIED), CENTS PER LB., DELIVERED FIRST RECEIVERS, PART AND FULL TRUCKLOTS AS OF 19 AUGUST 2005.

The market tone on tom drums was cautiously steady to steady, tom necks steady to barely steady, tom full-cut wings barely steady to fully steady mostly steady and tom 2-joint wings firm. Demand on tom necks light to moderate, balance mostly moderate to good into domestic and export channels. Offerings of tom necks adequate to instances ample; tom full-cut wings light to fully adequate, mostly adequate; tom drums adequate to fully adequate; tom 2-joint wings short and held with confidence. The market tone on hen 2-joint wings was firm due in part to the good tray pack demand. Offerings short. The white meat market continued active with the light tom live weights continuing to affect availability of product. Some further processors are also planning extended schedules in preparation for the upcoming holiday weekend. Trading active on frozen tom breast meat for domestic shipments and on open priced fresh tom drums, firm priced frozen tom drums and frozen thigh meat for export. For domestic: livers 23, plant grade basted 20-24 lb. breasts 150, fresh wing meat with skin 78-81, fresh scapula 109-113 mostly 110-113, fresh breast trim 167 cents delivered. For export: tom defatted gizzards 54 shipping point, tom necks 32 cents delivered.

EXPORT TRADING	PRICE	L.S.T.	WTD AVG	VOLUME	WEEKLY	WEEKLY
FRIDAY, AUGUST 19, 2005	RANGE	CODE 1/	PRICE	(000)	PRICE	(000)
DRUMSTICKS, TOMS	46.00-50.00		49.53	600	49.53	600
WINGS FULL-CUT - TOMS	33.00-34.00		33.33	120	33.50	160
WINGS, V-TYPE, TOM						
TAILS		F	28.50	80		
MECHANICALLY SEPARATED 2/		R	26.00	80	26.00	80
THIGH MEAT - FROZEN	89.00-96.00		94.06	288	92.27	408
EXPORT TRADING	PRICE	L.S.T.	WTD AVG	VOLUME		
THURSDAY, AUGUST 18, 2005	RANGE	CODE 1/	PRICE	(000)		
DRUMSTICKS, TOMS		R	47.78	368		
WINGS FULL-CUT - TOMS	34.00		34.00	40		
WINGS, V-TYPE, TOM						
TAILS		F	28.50	80		
MECHANICALLY SEPARATED 2/	26.00		26.00	80		
THIGH MEAT - FROZEN	87.00-89.00		88.00	80		
EXPORT TRADING	PRICE	L.S.T.	WTD AVG	VOLUME		
WEDNESDAY, AUGUST 17, 2005	RANGE	CODE 1/	PRICE	(000)		
DRUMSTICKS, TOMS		R	47.78	368		
WINGS FULL-CUT - TOMS		F	34.00	52		
WINGS, V-TYPE, TOM						
TAILS		F	28.50	80		
MECHANICALLY SEPARATED 2/		W	26.57	184		
THIGH MEAT - FROZEN		M	88.00	40		
EXPORT TRADING	PRICE	L.S.T.	WTD AVG	VOLUME		
TUESDAY, AUGUST 16, 2005	RANGE	CODE 1/	PRICE	(000)		
DRUMSTICKS, TOMS		R	47.78	368		
WINGS FULL-CUT - TOMS		F	34.00	52		
WINGS, V-TYPE, TOM						
TAILS		F	28.50	80		
MECHANICALLY SEPARATED 2/		W	26.57	184		
THIGH MEAT - FROZEN		M	88.00	40		
EXPORT TRADING	PRICE	L.S.T.	WTD AVG	VOLUME		
MONDAY, AUGUST 15, 2005	RANGE	CODE 1/	PRICE	(000)		
DRUMSTICKS, TOMS		R	47.78	368		
WINGS FULL-CUT - TOMS		F	34.00	52		
WINGS, V-TYPE, TOM		M	29.00	540		
TAILS		F	28.50	80		
MECHANICALLY SEPARATED 2/		W	26.57	184		
THIGH MEAT - FROZEN	88.00		88.00	40		

1/ CODES FOR LAST SIGNIFICANT TRADE (L.S.T.): M=MONDAY T=TUESDAY W=WEDNESDAY R=THURSDAY F=FRIDAY

2/ Product contains 15-20% fat with skin added.